

World Deepwater Market Forecast 2015-2019

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World Deepwater Market
Estimated To Increase by 69%

Deepwater expenditure is expected to increase by 69%, compared to the preceding five-year period, totalling \$210 billion (bn) from 2015 to 2019. As production from mature basins onshore and in shallow water declines, development of **deepwater** reserves has become increasingly vital, particularly to the world's oil majors. However, the recent oil price decline has intensified pressure on operators' budgets. Consequently, numerous operators have deferred sanctioning of capital intensive developments.

Africa, Latin America and North America will continue to dominate **deepwater** Capex, with \$173bn set to be spent over the next five years with Africa forecast to experience the greatest growth. The development of East African natural gas basins has not been aided by the plunge in Asian gas prices; however, the development of these gas basins is inevitable. The expected recovery of oil prices will spark a revival in LNG-related activities in the region towards the end of the forecast period. Latin America will, however, remain the largest market and North America is expected to experience the least growth.

In addition to the low oil price environment, building oversupply and the lack of rig demand will impact Capex growth over the forecast period. In recent years, record **deepwater** rig demand has resulted in unprecedented levels of rig orders.

World Deepwater Market Forecast covers all key commercial themes relevant to players across the value chain in the deepwater sector:

- Supply chain – detailing the financing of deepwater developments, contractors, equipment and installations. Includes analysis of contracting strategies (e.g. frame agreements), dayrates, key players and capabilities of each sector within the deepwater market (drilling, FPS and subsea hardware).
- Key drivers – discussion of factors encouraging deepwater activity – including deepwater production to offset declining production from onshore and shallow water basins, E&P spend of international operators and Petrobras' activity in Brazil.
- Regional forecasts – forecast Capex within each region, including examples of notable projects and operators within the region and countries with most activity.
- Component forecasts – drilling and completion (subsea and surface completed wells), subsea production hardware, SURF and trunklines.
- Focus areas – examination of deepwater provinces, including recent discoveries in East Africa.
- Procurement – factors affecting the decisions facing FPS operators, whether to lease or own vessels and details of major leasing contractors.
- List of deepwater prospects – includes information on all identified prospects coming onstream from 2015 to 2019 by operator, location, water depth, number of trees and status category.

SCOPE:

Market forecasting is trusted by sector players worldwide, with clients including the world's top-10 oil & gas companies, top-10 oilfield services companies and top-10 private equity firms.

The report is essential for financial institutions, equipment manufacturers, offshore construction companies, drilling operators, oilfield service companies, shipbuilders and oil & gas companies wanting to better understand where and when to make investment decisions.

Our proven approach includes:

- Unique and proprietary data – updated year-round from published sources and insight gained from industry consultation.
- Detailed methodology – the report uses research from 'Deepwater Database', an in-house information system exclusive. Our global analyst team is involved in the gathering and analysis of deepwater market data through primary research and professional networks. A project-by-project review of development prospects drives a data-rich market model and forecast.
- Comprehensive analysis – comprehensive examination, analysis and 10-year coverage of deepwater expenditure.
- Concise report layout – consistent to delivering value for our clients, all our market forecasts have a concise layout consisting of industry background and supporting materials condensed to enable quick review with 'speed-read' summaries of key points throughout.

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Key questions answered in this report

- What is the Deepwater Market expenditure for preceding years ?
- Why Deepwater Reserves become Vital ?
- What are the countries associated to the Deepwater Development Market ?
- How the Future Market of Deepwater Reserves will be ?
- What are the key commercial things related to Deepwater Market ?
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- A detailed qualitative analysis of the Deepwater Market, commercial views is available in the report.

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